



Vendor Evaluation Questions

Questions to help independent practices evaluate fit, implementation burden, support, risk, and total value - before a contract is signed.

Do not let a product demo define your requirements. Start with the problem you are trying to solve, the workflow that must improve, and the business outcome that matters.

Business Fit

What specific practice problem is this product designed to solve, and how will we measure improvement?

Notes: _____

Which capabilities are included in the base product versus optional modules or paid add-ons?

Notes: _____

What kinds of independent practices are the best fit - and which are not?

Notes: _____

What assumptions does your solution make about staffing, workflow, patient volume, or technical maturity?

Notes: _____

Integration & Data

What systems do you integrate with today, and which integrations require custom work or third parties?

Notes: _____

Who owns the data, and how can we export it in a usable format if we leave?

Notes: _____

What information must be entered twice because it does not move automatically between systems?

Notes: _____

How are integration failures detected, communicated, and resolved?

Notes: _____

Implementation & Adoption

Who is responsible for project management, configuration, migration, testing, and training?

Notes: _____

What work will our staff need to perform before go-live?

Notes: _____

What is a realistic implementation timeline for a practice our size?

Notes: _____

What commonly causes implementations to run late or exceed budget?

Notes: _____

Support & Service

What support channels and service hours are included?

Notes: _____

What are your target response and resolution times for critical issues? Notes: _____

Will we have a named account/contact, or will support be queue-based? Notes: _____

How do you handle after-hours outages or issues affecting patient care or revenue operations? Notes: _____

Security, Reliability & Risk

What security controls, independent assessments, and incident-response processes do you maintain? Notes: _____

Where is our data hosted and backed up, and what recovery commitments do you provide? Notes: _____

How do you notify customers of security incidents, outages, or material service degradation? Notes: _____

What dependencies do you have on other vendors or platforms that could affect our service? Notes: _____

Commercial Terms & Exit

What is the complete first-year and recurring cost, including implementation, interfaces, support, training, hardware, and minimum commitments? Notes: _____

How do prices change at renewal, and what notice is required to cancel or reduce service? Notes: _____

What happens to our data, integrations, and access when the agreement ends? Notes: _____

What transition assistance is included if we move to another vendor? Notes: _____

Decision rule: A vendor should be able to explain not only what the product does, but how the practice will successfully adopt it, support it, measure it, and exit it if needed.